

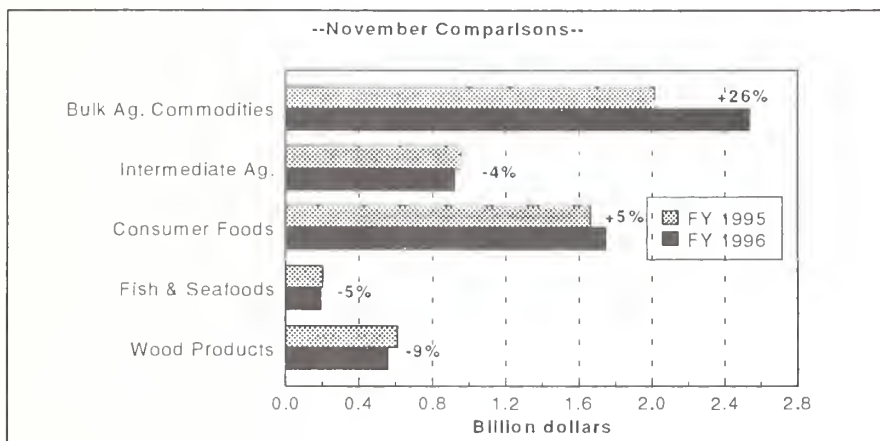
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Agricultural Trade Highlights

Exports Rise 9 Percent in November

Bulk Commodities Account for Most of Gain



November 1995 trade statistics released by the Commerce Department placed the value of U.S. agricultural, fish, and forest product exports at \$6 billion, a 9-percent increase over November 1994. Agricultural exports alone totaled \$5.2 billion, up 12 percent over year-ago levels. Bulk and consumer-oriented exports registered gains of 26 and 5 percent, respectively. Export value for intermediate products fell 4 percent. Fish and forest products totaled \$760 million in November, down 8 percent from the same month last year.

November's shipments bring the 2-month year-to-date total for agricultural, fish, and forest product exports to \$11.9 billion in fiscal year 1996, 12 percent higher than the same period a year earlier. Agricultural exports were the best performers, growing 15 percent over the same 2-month period last year to \$10.4 billion. Bulk exports were up 29 percent, while intermediate exports fell 2 percent and the rate of growth for consumer foods slowed to 8 percent compared to a year ago. Total export value for fish and forest products fell 6 percent from the first 2 months of last year to \$1.6 billion.

At \$2.5 billion in November, U.S. exports of *bulk commodities* increased 26 percent over the same month last year. Gains were broad-based, with the sharpest recorded by wheat, coarse grains, soybeans, and cotton. During the first 2 months of the new fiscal year, bulk commodity exports totaled \$4.9 billion, up 29 percent over the same period last year. Higher prices and advanced purchasing for grains and oilseeds continue to boost bulk exports. A 32-percent increase in cotton sales reflects heavier buying by several East Asian countries.

U.S. exports of *intermediate products* were \$927 million in November, down 4 percent from the same month last year. Declines for soybean oil, live animals, animal fats, wheat flour, and sweeteners more than offset gains for vegetable oils (other than soybean oil), feeds and fodders, hides and skins, and planting seeds. For the first 2 months of fiscal year 1996, intermediate product exports were down 2 percent to \$1.8 billion with soybean oil and live animals recording the largest declines.

Despite continued slow sales to Mexico, worldwide exports of U.S. *consumer-oriented products* totaled

\$1.75 billion in November, up 5 percent from the same month last year. Most of the gain was due to the continued expansion of red meat and poultry meat exports. However, fresh fruit, juices, and wine and beer also posted gains. For the first 2 months of fiscal year 1996, consumer food exports posted an 8-percent rise over the same period last year.

At \$196 million in November, edible fish and seafood exports fell 5 percent over the same month last year. Declines were recorded in three of the five product groups with the largest registered by crab and crab meat and surimi.

U.S. *forest product* exports totaled \$564 million in November, down 9 percent from last year's level. Declining log sales, due in part to high inventories in Japan, continue to account for most of the downturn in export value for this product category.

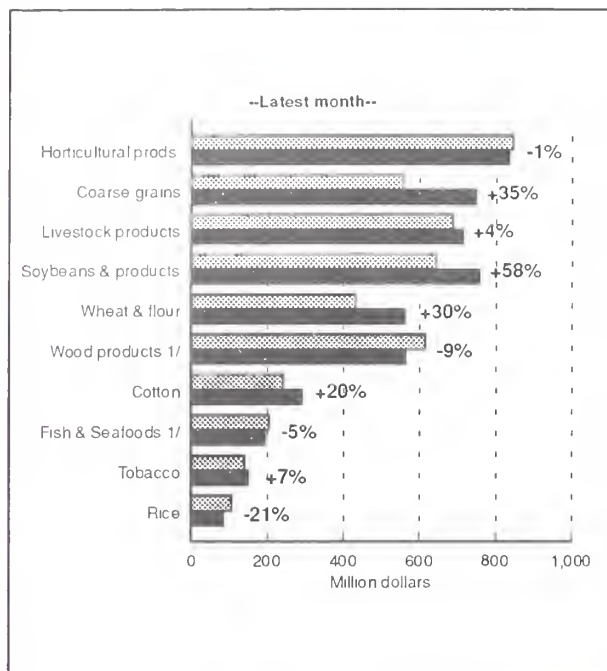
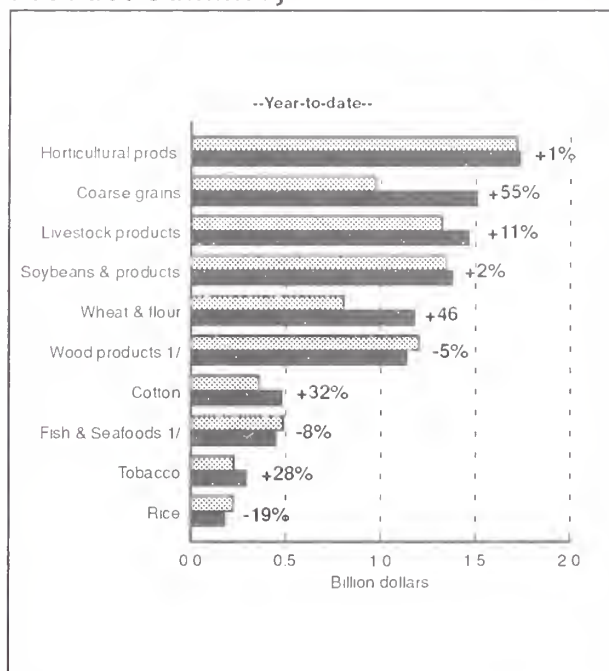
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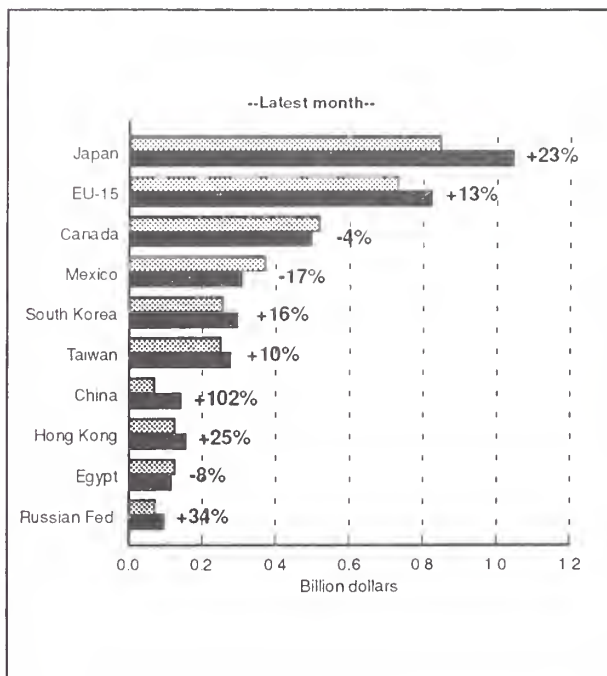
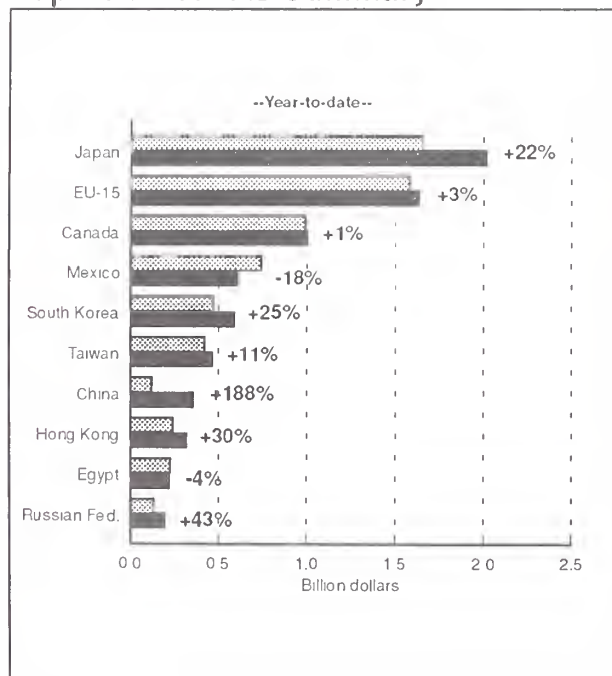
U.S. Agricultural, Fish and Wood Export Summaries

October-November and Latest Month Comparisons  FY '95  FY '96

Product Summary



Top Ten Markets Summary



Note: Percentages are computed as the change from a year ago.

Consumer Food Highlights

U.S. consumer food exports totaled a record \$17.2 billion during the first 11 months of calendar 1995, up from \$15.4 billion during the same period a year earlier. The strong export showing largely is attributed to continued strong sales to Japan, the leading export market for U.S. consumer-oriented agricultural products, as well as to Hong Kong, Korea, and the Russian Federation. Exports to each of these countries are at record levels. Cumulative export value, through the end of November, from thirteen of the 16 consumer food categories exceeds the same 11-month period in 1994.

U.S. exports of *fresh, frozen, and chilled red meat* during January to November 1995 totaled \$3.8 billion, up 24 percent over 1994. Shipments to Japan, the number 1 export market, were up 36 percent at a record \$2.5 billion. Although the increase in exports to Japan is impressive, the overall improvement in export sales spans a large number of countries. To date, 11 countries have achieved record export levels. Import demand in Korea for U.S. red is benefitting from the recently negotiated settlement of the shelf-life issue. Exports to Korea for entire calendar 1995 are forecast to reach \$350 million. Since the initial opening of the Korean market in 1989, U.S. beef exports have grown rapidly. The U.S. beef industry is attempting to maintain its 50-percent market share in the face of stiff competition from Australia and New Zealand. Exports to the Russian Federation during January to November 1995 were up nearly 400 percent at a record \$132 million. Russia has emerged as the fifth largest market for U.S. fresh, frozen, and chilled beef exports.

Fresh fruit export value during January to November 1995 reached \$1.83 billion, up marginally over a year earlier. The slight change in overall performance by this product category, is masking a strong showing for citrus fruit. Fresh citrus exports during January to November 1995 totaled \$663 million compared to \$605 million during the same period in 1994. Citrus export value is being boosted by heavier shipping volumes for lemons and grapefruit along with stronger orange prices. Increased demand in the Japanese, Hong Kong, and Indonesian markets resulted in record export levels.

Deciduous fruit exports were down 5 percent at \$902 million. However, the decision of the Philippines to cut duty rates on a range of fresh fruit and Brazil's willingness to relax its technical import requirements on U.S. pears and citrus fruit is encouraging news. Brazil has become an important market for U.S. deciduous fruit, particularly pears.

Exports of *processed fruits and vegetables* during the first 11 months of calendar 1995 reached \$1.75 billion, up 12 over the same period a year earlier. Increased exports of frozen french fries, canned tomato products and canned corn continue to dominate this consumer food product group. Larger sales volumes in the Canadian, Japanese, and U.K. markets are noteworthy.

Fresh vegetable exports during January to November 1995 totaled \$982 million, up from \$932 million in the same 11-month period in 1994. A broad range of vegetables recorded increased sales figures, with the most impressive performances turned in by lettuce, celery, carrots, cauliflower and broccoli. Sales to Canada continue to trend upward. The Canadian market accounts for two-thirds of total fresh vegetable exports. Export expansion opportunities are bright in Japan and other Asian markets. A growing demand for pre-cut and organically produced vegetables is likely to result in strong growth for this product grouping.

Fruit and vegetable juice exports during the first 11 months of 1995 reached a record \$606 million, up 22 percent over a year earlier. Increased sales of citrus, apple, grape, and mixed fruit juice are

noted. U.S. orange juice exports are forecast at record levels during the current marketing season. Sales of premium, single-strength orange juice to Canada and Western Europe are up markedly in response to promotional efforts funded under the Market Promotion Program.

Poultry meat exports during January to November 1995 totaled a record \$1.8 billion, up from \$1.4 billion in 1994. Sales to the Russian Federation, the leading export outlet, almost doubled to a record \$522 million. Export sales to Hong Kong, the number 2 market, also were up markedly at a record \$370 million. Russia raised its import duty on poultry meat from 25 to 30 percent in an attempt to trim imports, but a strong import demand may keep sales at high levels. Thailand, a key competitor to the United States in Asian markets, is expected to increase its production and export volumes next year.

Snack food exports fell 5 percent to \$960 million during the first 11 months of 1995. The drop in export value largely reflects a weakened import demand in Mexico for non-essential foods due to the drop in the value of the peso.

Exports of *pet food* (dog and cat food) rose 9 percent to \$577 million in the January to November 1995 period. Record exports to Japan offset reduced shipments to Mexico and the United Kingdom, while shipments to Canada are flat.

Wine and beer exports increased 21 percent to a record \$601 million during January to November 1995. Approximately two-thirds of the overall increase was accounted for by heavier beer shipments. Sales were up markedly to the United Kingdom, Brazil, Taiwan, and Hong Kong.

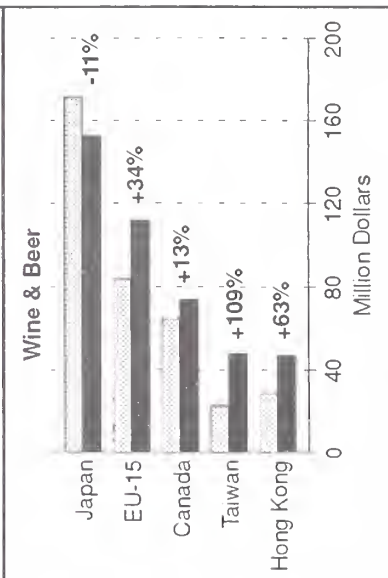
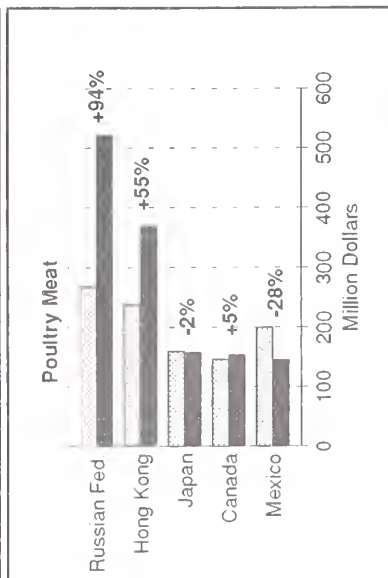
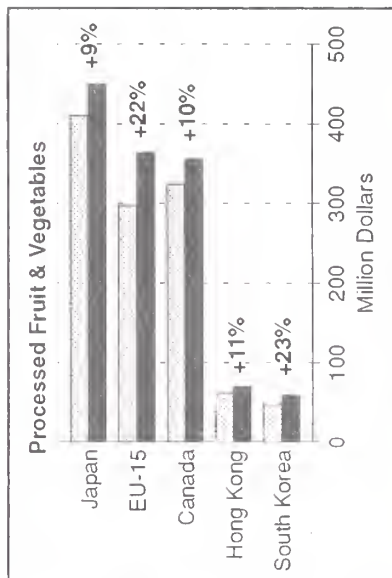
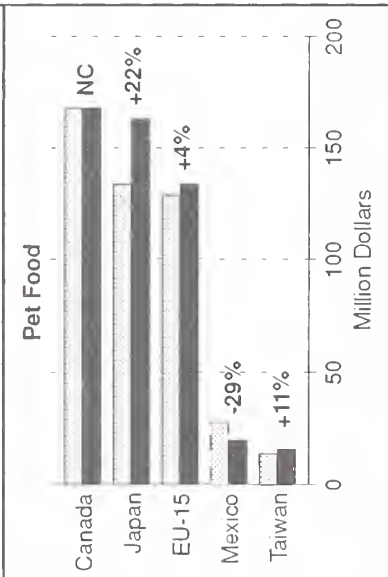
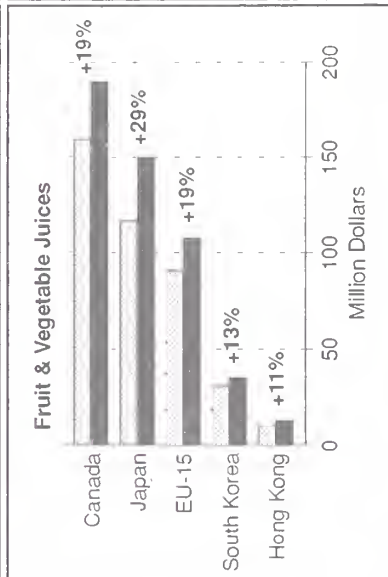
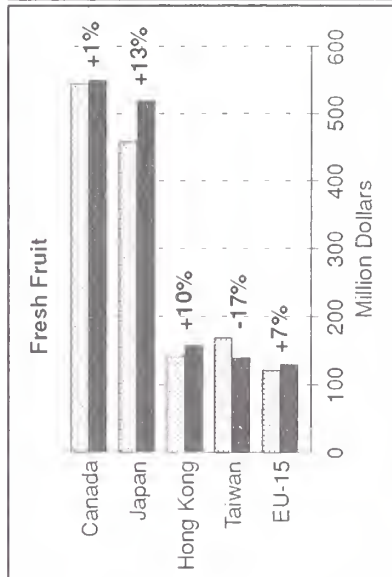
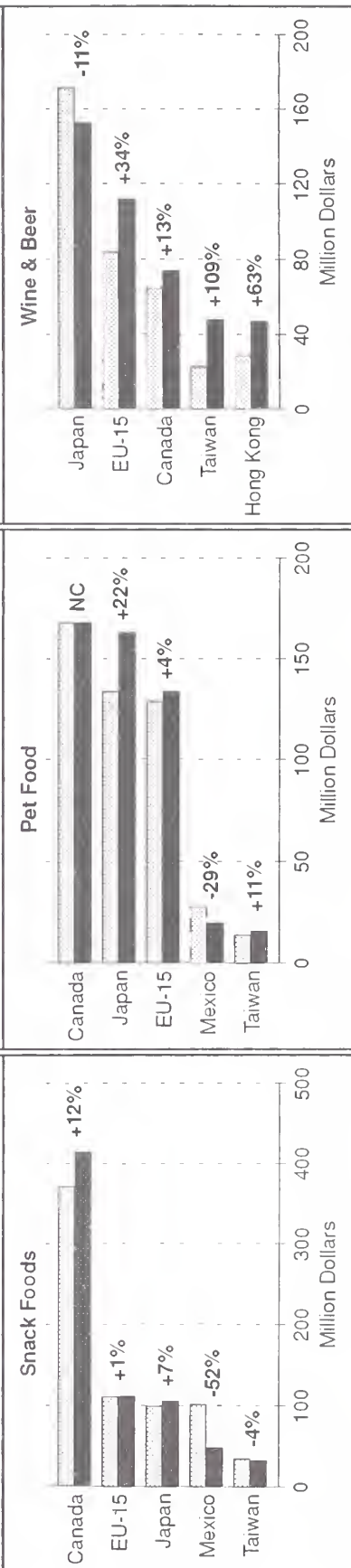
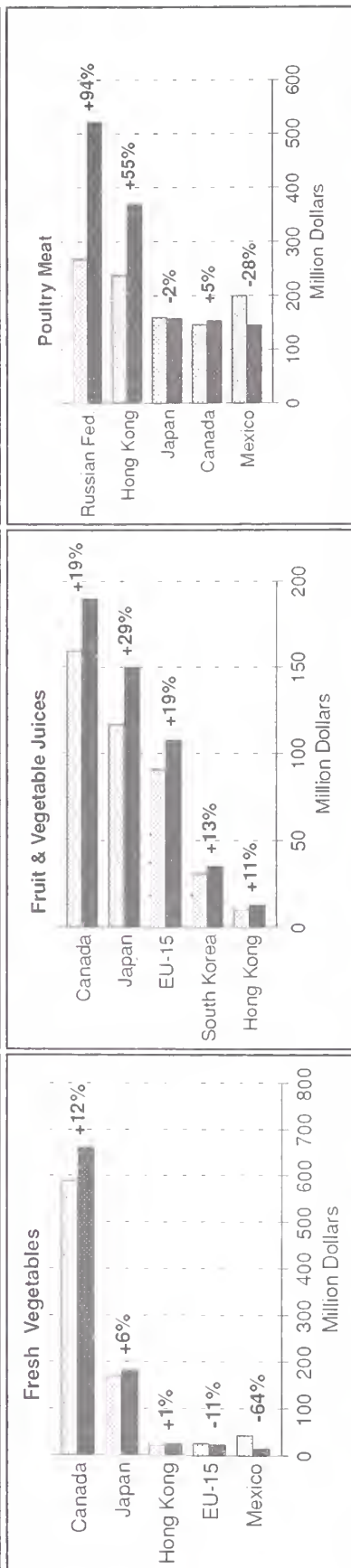
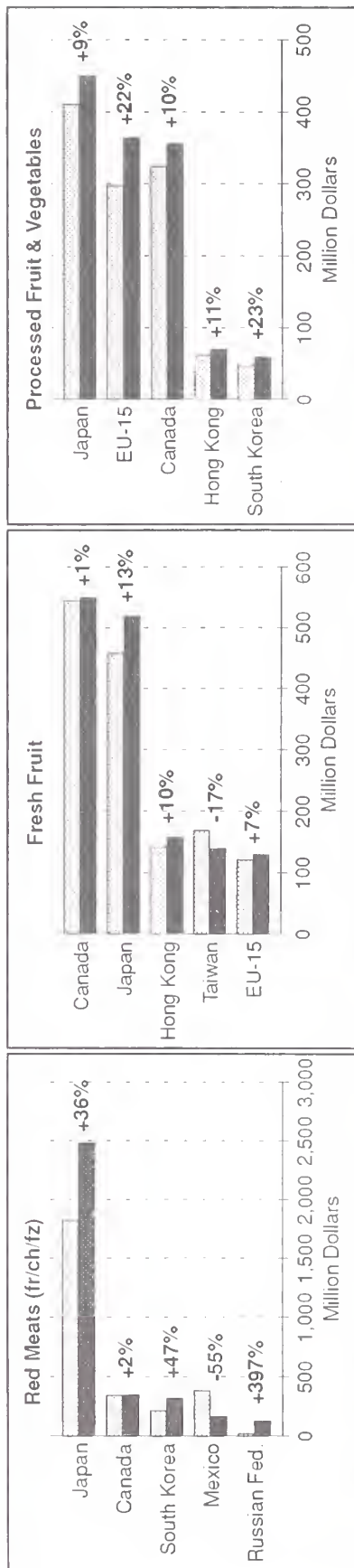
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Top Five Markets for Selected U.S. Consumer Foods

January Through November Comparisons

CY '94

CY '95



Notes: Percentages are computed as the change from 1994 to 1995. Countries are ranked from highest to lowest based on CY 1995 exports.

Country Spotlight: Argentina

Major economic reforms implemented by the Argentine Government in recent years have promoted economic growth, removed trade barriers, and unleashed pent-up consumer demand for imported goods. Excellent sales opportunities exist in this emerging market for U.S. suppliers of agricultural products. U.S. exports of agricultural products to Argentina in 1995 were forecast at a record \$120 million compared to less than \$28 million in 1990. Sales of U.S. high-value, consumer-oriented agricultural goods offer the greatest growth potential. U.S. export shipments to Argentina of intermediate agricultural products also are up sharply. High domestic production costs combined with a strong currency and reduced duty levels make U.S. consumer foods price competitive in the Argentine market. Argentine consumers are now accustomed to the superior quality offered by American processed foods.

Role of Agriculture

Argentina's agricultural sector is both large and diversified thanks to a moderate climate, good rainfall, and rich soil. It accounts for about 7 percent of the national economy and more than half of the value of the country's exports. Although the overall Argentine economy has benefitted greatly from recent economic reforms, the agricultural sector remains fairly stagnant. Producers have been hit with increased taxes, and the

relatively high debt load that they are carrying does not support new investment. Argentina's agricultural sector is not likely to show significant growth in the near-term. Although a severe drought affected important crop and livestock regions of the country during most of last year, producer returns are being bolstered by favorable international price levels for many of Argentina's key export crops and the elimination of export taxes on most commodities.

Economic Reforms

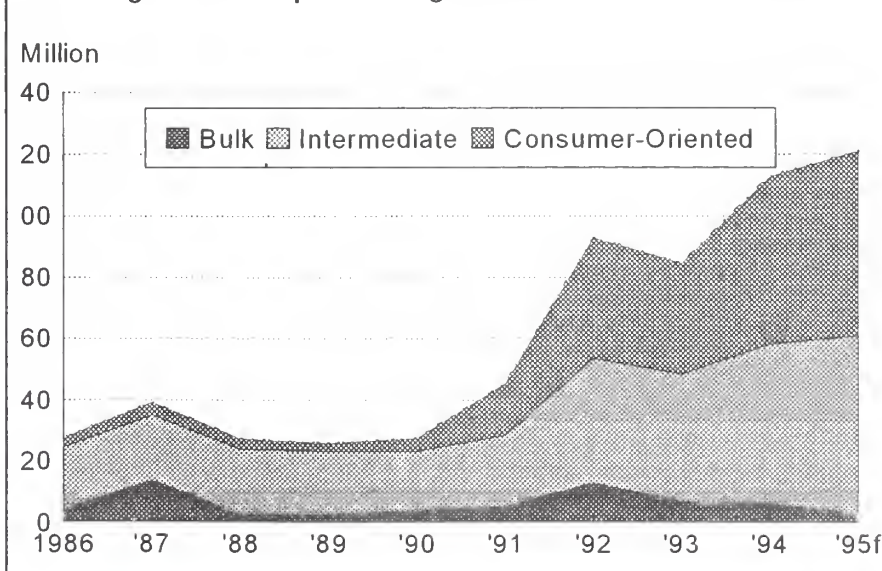
Following the implementation of its economic stabilization plan in 1991, Argentina was looked upon as a model for Latin American economic reform. Priority objectives of Argentina's structural adjustment package included reigning in inflation, which not long ago had been as much as 5,000 percent annually, stabilizing the value of the peso, promoting economic growth, privatizing and deregulating various sectors of the economy, and opening the country to foreign investment and trade.

The economic reforms have yielded dramatic results. Argentina's gross domestic product during the 1991-1994 period grew at an average annual rate of 7 percent while inflation fell to approximately 4 percent. Consumer confidence soared, with most Argentines believing that a period of prosperity and stability had been ushered in. The economy was being driven by a surge in consumer spending, with a boom in imports financed by strong capital inflows.

The Mexican financial crisis, which began in late 1994, disrupted foreign capital inflows. The Argentine Government responded by instituting significant reductions in government expenditures, increasing taxes, and negotiating emergency credit facilities with the International Monetary Fund. As a result of these actions, economic growth was minimal and unemployment rose sharply in 1995. Consumer demand for imported goods in general has softened. Nevertheless, the long-term outlook for Argentine imports of agricultural products remains bright.

The marketing of U.S. products in the Argentine market is aided by measures adopted by the Government to stabilize Argentina's currency. Since the implementation of Argentina's Currency Convertibility Plan in 1991, consumer prices have risen approximately 70 percent. This translates into a 70-percent inflation rate in dollar terms, given that the dollar and the peso are nearly equivalent under the Convertibility Plan. This enhances the price competitiveness of

U.S. Agricultural Exports to Argentina Reach Record \$120 Million



...Argentina

imported U.S. agricultural products. Although the peso is generally viewed as overvalued, many Argentine analysts are discouraged from devaluing the currency out of concern that the real impact of a nominal devaluation would disappear quickly in an upward spiraling round of price increases. This concern is based upon Argentina's recent experience with hyperinflation.

Agricultural Policy

Traditionally, the Argentine Government protected its domestic agricultural sector through relatively high import tariffs, inspection fees, and various registration systems. Import duties, however, have been sharply reduced, and much of the bureaucratic measures imposed on importers have been simplified or eliminated following the implementation of the economic reform program in 1991.

Today, Argentina's agricultural policy favors progressively less involvement by the Government. With the exception of tobacco, there are no major programs or subsidies to promote agricultural production or trade. The sector as a whole is viewed as being fairly competitive and productive. In general, current policies are forcing producers to cut costs and improve their productivity. Efficient producers are expected to expand their operations by absorbing inefficient units that are unable to adjust to the new competitive environment.

Given the importance of exports and the limited fiscal resources of the Government, Argentina's agricultural policy focuses on maximizing international trade opportunities as a means of encouraging growth in this sector. The Government announced in 1992 that all exports would benefit from a system of export rebates. For almost all agricultural products, this means a payment ranging from 1.5 percent to 10 percent of export value. These rebates are not viewed by the Government as an export subsidy, but as an attempt to return part of the taxes assessed against these products in production and marketing.

Export taxes for almost all products have been eliminated. A 3.5 percent export tax, however, continues to be assessed against soybean and sunflower seed exports to encourage domestic processing of oilseeds.

Overall Trade Trends

Argentina's agricultural trade in 1994 reached \$10.2 billion, with imports of \$1.6 billion and exports of \$8.6 billion. Argentina is more than 95 percent self-sufficient in food. Traditionally, Argentine agricultural imports have consisted largely of non-competitive products such as coffee, cocoa, and tropical fruit, which either are not grown or are produced in limited volume.

The dismantling of Argentina's trade barriers as part of the Government's economic restructuring has permitted Argentine consumers to enjoy a new array of imported agricultural products that previously were unavailable. The impact on trade has been most profound for high-value, consumer-oriented foods. Import demand has grown rapidly since the domestic food processing sector only offers a limited selection of consumer-ready foods and is a high-cost provider.

Because of the size of its annual production in relation to a relatively limited population (approximately 34 million), Argentina's agricultural sector is highly dependent upon exports for marketing most of its major commodities. Key export items include oilseeds and products, wheat, corn, beef, tobacco, sugar, apples, pears, cotton, and wool. Over the past 2 decades, oilseeds and products exports have increased sharply and have displaced wheat, corn, and other grains as the dominant export crops. Argentina is the world's second largest exporter of fresh pears, ranks third in soybeans and corn, fourth in lemons, fifth in wheat and cotton, eighth in beef, and ninth in apples.

U.S. Market Position

The Argentine market in the past offered only limited sales opportunities for U.S. agricultural products. This largely

reflected the fact that our agricultural industries produce similar basic goods and that Argentina routinely has significant surplus availabilities for export. However, the same is not true for consumer-oriented agricultural products and, to a lesser extent, intermediate-stage agricultural goods. The food processing sector is relatively undeveloped and provides only a limited selection of high-cost products to Argentine consumers. Imports of U.S. processed foods have increased dramatically since 1991 when Argentine policy makers decided to open the local economy to foreign competition as part of an overall economic restructuring.

U.S. agricultural exports to Argentina have more than quadrupled since 1990, hitting a record \$113 million in 1994 and were forecast to set a new record of \$120 million in 1995. All of the expansion in export value is accounted for by consumer-oriented and intermediate-stage agricultural products. Both of these product groupings established record export levels to Argentina last year. In contrast, the value of bulk exports to Argentina in 1995 fell to \$3 million, and now accounts for less than 2 percent of total agricultural export value.

Although the value of U.S. agricultural exports to Argentina has increased markedly, the U.S. share of the Argentine import market has not changed significantly. In 1994, the United States supplied about 9 percent of the total value of all Argentine agricultural imports, down marginally from a year earlier.

Despite the surge in U.S. exports to Argentina over the past 5 years, Argentina continues to enjoy a favorable balance of trade in agricultural products with the United States. U.S. imports of Argentine agricultural products in 1995 were forecast at \$500 million (chiefly prepared/preserved red meat, fruit juice, sugar, tea, essential oils, and tobacco).

Third Country Competition

Argentine tastes and food preferences lean toward European products, at least among the older generation. Nevertheless, U.S. culture and food products enjoy instant

...Argentina

recognition in Argentina and have a strong appeal, particularly among the country's youth. More than 100,000 Argentine tourists visit the United States annually, returning with favorable impressions of U.S. processed food products.

The United States enjoys a freight cost advantage over European competitors. Brazilian exporters, however, are geographically better positioned to service the Argentine market and enjoy lower import duty rates under existing regional trade agreements.

Third-country promotional efforts in Argentina, carried out mostly by the United Kingdom, Italy, Germany, and Spain, are channeled through local embassies or trade offices. Promotional activities include in-store supermarket promotions in Buenos Aires as well as trade missions to their respective countries. Argentine imports of European food products tend to follow familiar patterns: Swiss chocolate, English tea, French wine, Italian pasta, Spanish olive oil, and German snacks and pastries.

Agricultural Trade Policy

The Argentine Government has pinned the growth and prosperity of its agricultural sector to maximizing international trade opportunities. This decision rests upon the recognition that the sector already is export oriented and that Argentina has embraced a free trade regime under the framework of its economic reform package. It also represents a tacit acknowledgment that fiscal resources available to the Government for promoting the development of the sector are limited and that it will be taking a hands-off approach under a general principle of deregulation.

Argentina had previously protected its domestic agricultural sector through the use of relatively high import tariffs, inspection fees, and various registration systems. Many of the regulations and procedures required of importers have been simplified or eliminated. Argentina committed in the Uruguay Round to establish a 35-percent import tariff ceiling for agricultural products, and a 3-percent

statistical tax.

Argentina now applies the common external tariffs of the Mercosur customs union formed with Brazil, Uruguay, and Paraguay in January 1995. For agricultural goods entering Argentina from non-member Mercosur countries, duties vary between 0 and 20 percent. A zero duty rate generally applies on agricultural trade within Mercosur.

Although Argentina realizes that the adoption of a liberalized trade regime means opening its market to competition, it believes that the agricultural sector will achieve a net benefit from increased trade. Argentina hopes to maximize its agricultural exports through the Uruguay Round Agreement and Mercosur. As part of its Uruguay Round commitments, the United States established tariff-rate quotas on peanuts and peanut paste. The United States agreed to allocate 78 percent of the peanut quota and about 25 percent of the peanut paste quota to Argentina.

The reduced interregional tariffs offered within Mercosur have opened new trade possibilities. With an eye to the Mercosur market, Argentine firms are actively seeking joint ventures with foreign-based food processing companies. These new business alliances bring much needed investment to Argentina's agricultural sector. The importance of Mercosur is evident in Brazil becoming Argentina's major trading partner.

Phytosanitary Trade Issues

Argentina is targeting an expansion of its beef industry through the initiation of export sales to North American and Asian markets that previously have been closed to Argentine product due to foot-and-mouth disease. Beef exports to these countries will be permitted under the regionalization concept agreed to in the Uruguay Round Agreement.

The United States recently modified its tariff schedule to reflect a 20,000-ton beef tariff-rate quota specifically allocated to Argentina during the Uruguay Round negotiations. USDA regulations are being modified to recognize animal disease-free

zones within Argentina to facilitate this trade. Argentina hopes that acceptance of its beef by the United States will impact favorably on other countries. Many of these accept the health and safety standards of the United States and, therefore, may formulate their own import programs for Argentine beef.

In an attempt to promote its local citrus industry, Argentina is seeking access to the U.S. market. At present, USDA prohibits the entry of Argentine citrus due to concerns over various pests and diseases. Discussions between the two countries are ongoing to resolve this quarantine issue.

The U.S. industry also is eager to resolve outstanding phytosanitary issues impacting on U.S. exports to Argentina. Recent liberalization measures have opened the Argentine market to imports of U.S. fruit that previously had been largely prohibited. The establishment by Argentina of consistent, transparent, and science-based phytosanitary import requirements is critical in developing this trade.

A case in point is the sale of California fresh fruits and vegetables in Argentina. Argentina suspended imports of fresh produce from California in late October 1995, in response to oriental fruit fly detections in that state. USDA's Animal Plant Health Inspection Service (APHIS) provided Argentine officials with background information and technical materials related to the detections, none of which occurred near commercial growing areas. Furthermore, the detections do not meet APHIS' criteria for an infestation. USDA requested that Argentina lift the embargo. Although no action has yet been taken, the issue is under review by Argentine officials.

In contrast to the Argentine situation, a similar ban on California produce imposed by Brazil on November 7, 1995, was lifted the following week after an exchange of technical information. APHIS agreed to certify that California export shipments originate in fly-free zones. The United States also is seeking a lifting of Argentina's ban on the importation of Florida's citrus.

Retail Marketing System

Food retailing in Buenos Aires has evolved considerably during the past 2 decades. The number of modern supermarkets and self-service stores has increased dramatically and now account for approximately 60 percent of all food sales. Although the traditional mom-and-pop, corner grocery stores are still evident, their role in food merchandising is declining. The trend in retailing is towards larger units that offer customers one-stop shopping. Product range offered by many of these stores extends beyond a diversified line of food products to include clothing, household appliances, and automotive supplies.

During the past 5 years, several large, modern shopping centers have been built in the middle- and upper-income neighborhoods of Buenos Aires. These shopping malls, usually containing supermarkets or hypermarkets, compare favorably with many in the United States in size and merchandise alternatives.

The Argentine food distribution network includes both local and foreign-based supermarkets. A U.S. food chain was scheduled to open in Buenos Aires late last year. Included in Argentina's food retailing are no frills, discount stores, which are tied to a quantity sales approach.

Argentina's food distribution system has significantly improved its refrigerated product-handling capabilities in recent years. Retailers are no longer concerned about the potential risk of large inventories of chilled and frozen foods. This has enhanced frozen food availability, and demand for these products is growing rapidly as freezers and microwave ovens have become standard household appliances in most middle- and upper-income households. Marketing opportunities exist in the Argentine market for expanding sales of a wide array of ready-to-eat foods.

A variety of fast food restaurants, including many major U.S. chains, is evident in Argentina. Although these restaurants provide their customers with

speedy service, they are not inexpensive. According to a published report last year in a local newspaper, the total charge in Buenos Aires for a McDonald's hamburger, soft drink, and fries, including a 21-percent value-added tax, was approximately \$5. This survey ranked Buenos Aires as the third most expensive city in the world behind Geneva and Tokyo. Patronizing a fast food restaurant in Buenos Aires generally is viewed as fashionable and an upscale eating alternative. Because fast food restaurants are relatively expensive, they usually cater to middle- and upper-income households.

Import Distribution/Product Registration

Argentine supermarkets merchandise approximately 80 percent of all imported food products. While some major supermarket chains import directly to minimize their unit costs, most products initially enter the country through an importer. The importer usually sells the product to wholesalers who, in turn, sell to supermarkets, or the importer may sell directly to retailers.

U.S. exporters must work through a local importer to obtain import product registration and documentation. Although U.S. exporters may sell directly to an Argentine supermarket chain to facilitate market penetration, this ultimately may reduce product distribution and, therefore, future export sales. Unless a product is very popular and in high demand, supermarkets often will not carry a product imported by a single retailer.

Product registration is required for processed foods prior to importing. The registration process is handled by the local importer and usually takes between 15 and 30 days. Once approved, the importer is issued a national register of food products (RNPA) number. The importer who receives the RNPA enjoys a degree of exclusivity in importing the same product since the permit is specific to the importer. Another importer interested in importing the same product must go through the same import registration process. This is required since importers are expected to be responsible for the product. Prior to entering retail channels, all imported

processed food products are affixed with a label stating the name of the importer, ingredients, and the RNPA number. Once an importer has obtained an RNPA, he is not required to reapply for future importations of the same product.

Food Processing Sector

With the exception of beef and oilseeds, Argentina's food processing sector is relatively undeveloped. Years of economic uncertainty and the absence of Government incentives discouraged investment in this sector. The industry is characterized by a relatively low level of capitalization, high production costs, and poor quality standards. Now that inflation has been brought under control, new investment is being attracted. Food processors are being forced to modernize their facilities so they can compete with foreign-made products that are now readily available. Argentine food manufacturers seek joint production ventures and marketing arrangements with foreign food processors so they can tap into new sources of capital, technology, and marketing expertise. U.S. firms looking into business alliances with Argentine food processors are attracted by the marketing possibilities generated by Argentina's membership in Mercosur.

Marketing Opportunities for Processed Foods

The Argentine Government's decision to adopt a liberalized trade regime has created an improved sales environment for U.S. agricultural products. Although sales potential for U.S. bulk commodities is quite limited, Argentine consumers have quickly taken to the high quality of U.S. processed foods. U.S. exports of consumer-oriented agricultural products during 1995 were forecast to reach a record \$60 million compared to only \$4 million five years ago.

Several factors account for the strong growth in exports. Import barriers in the form of registration fees and inspection procedures have been simplified or eliminated. Import duties assessed against most U.S. processed food products have fallen to between 5 and 15 percent and no longer represent a significant barrier to

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trade. Many Argentine consumers were exposed to foreign processed foods for the first time only within the past couple of years. Inefficient and high-cost local food processors are no longer insulated from foreign competition. In most cases, they are unable to compete with the range and quality of imported U.S. processed foods.

Although the Argentine market is still relatively small, and the current economic downturn has resulted in a softening in import demand, the long-term growth potential for this market is significant. Argentine consumers have become accustomed to the availability of imported consumer-oriented food products, and the Government is not likely to deviate from its current free trade policies. Despite the efforts of local processors to modernize their plants, U.S. processed foods will maintain their distinctive quality and variety advantages over local products.

Most large supermarket chains are expressing an interest in handling private label products. This includes a host of processed foods including canned fruits and vegetables, breakfast cereals, and cake mixes. U.S. exporters should have a distinct advantage in servicing this market segment since many local manufacturers cannot meet the specifications sought by Argentina's large retailers.

There are a variety of good export prospects in the Argentine market. Beer exports to Argentina were expected to exceed \$7 million, more than double the value of 1994. Import demand for hops should remain strong as the local industry tries to expand its beer output. Pet food sales to Argentina in 1995 will reach a record level approaching \$7 million. U.S. dairy exports to Argentina in 1995 also established a new record for that commodity group. Increased sales of cheese and whey products should push export value for this commodity group to nearly \$6 million. Argentine consumers have shown a strong interest in U.S. snack foods (particularly potato chips and chocolates), with total exports in 1995 estimated at \$9.5 million. Sales of breakfast cereals and pancake mix exceeded a record \$2 million last year. Shipments of processed fruits and

vegetables in 1995 approached \$5 million, double the level of a year earlier. Argentine demand for frozen french fries, dried onion and potato products, and assorted canned vegetables is growing. Juice exports, particularly premium grade orange juice, are running strong, with the total value of shipments to Argentina in 1995 estimated at \$5.8 million. Heavy sales of almonds and walnuts pushed the value of tree nut exports to Argentina last year to nearly \$4 million. Although Argentina is a major beef producer and exporter, sales potential exists for variety red meat.

U.S. sales of intermediate agricultural products in the Argentine market also are trending upward. Total export value for these commodities in 1995 were expected to reach a record \$58 million, up more than 10 percent over 1994 and triple the level of 5 years ago. Exports of beverage drink bases and preparations, mostly for soft drinks, to Argentina in 1995 exceeded \$10 million. Also setting record export levels to Argentina last year were planting seeds. The United States is Argentina's largest supplier of forage seeds. Although alfalfa seed sales slipped somewhat this past year, corn seed sales quadrupled over 1994. Total planting seed exports to Argentina in 1995 are forecast at \$25 million. The Argentine market offers excellent opportunities for introducing new seed cultivars and the U.S. seed industry should actively pursue promotional efforts in this market.

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U.S. Exports of Agricultural, Fish & Wood Products to ARGENTINA

Calendar Years 1990 to 1995 and Year-to-Date Comparisons (\$1,000)

Product	Calendar Years					January-November		%
	1990	1991	1992	1993	1994	1994	1995	Chg
Bulk Agricultural Total	3,658	4,935	12,893	6,698	5,819	5,694	2,777	-51.2%
Wheat	0	3	1,931	113	2,916	2,916	487	-83.3%
Coarse Grains	0	0	0	23	0	0	56	NA
Rice	15	13	132	581 *	27	27	10	-63.0%
Soybeans	0	0	0	0	8	8	154	1825.0%
Cotton	2,407	2,508	789	2,151	181	181	652	260.2%
Tobacco	402 *	9	0	0	37	37	9	-75.7%
Pulses	51	21	0	56	120	120	47	-60.8%
Peanuts	36	68	279	110	127	127	60	-52.8%
Other Bulk Commodities	748	2,312	9,763 *	3,665	2,403	2,279	1,302	-42.9%
Intermediate Agricultural Total	19,838	23,671	40,611	41,851	52,481	44,047	53,505 *	21.5%
Wheat Flour	0	0	0	0	7 *	7 *	0	-100.0%
Soybean Meal	0	0	0	0	4	4	62 *	1450.0%
Soybean Oil	3	0	12	19	0	0	13	NA
Other Vegetable Oils	177	156	180	306	1,206 *	1,187	412	-65.3%
Feeds & Fodders (excl. pet foods)	742	784	1,328	745	1,441 *	1,373	1,206	-12.2%
Live Animals	2,515	2,653	2,121	2,715	3,030	2,905	4,851 *	67.0%
Hides & Skins	1,037	544	1,008	173	200	200	3	-98.5%
Animal Fats	1,301	3,401	4,759 *	3,507	60	60	0	-100.0%
Planting Seeds	9,969	9,354	20,072	17,798	25,070 *	19,417	23,185	19.4%
Sugars, Sweeteners & Bever. Bases	242	90	1,322	3,126	7,321	6,034	9,974	65.3%
Other Intermediate Products	3,852	6,690	9,809	13,463	14,142 *	12,860	13,798	7.3%
Consumer-Oriented Agricultural Total	4,091	16,883	39,490	36,072	54,476	46,487	55,114 *	18.6%
Snack Foods (excluding nuts)	290	2,157	8,430	9,333	10,506 *	9,845	8,845	-10.2%
Breakfast Cereals & Pancake Mix	0	58	303	878	1,165	1,081	1,725 *	59.6%
Red Meats, Chilled/Frozen	136	184	1,242	2,580	3,740 *	3,399	1,860	-45.3%
Red Meats, Prepared/Preserved	12	283	389	630 *	205	199	98	-50.8%
Poultry Meat	5	0	25	156	674	611	443	-27.5%
Dairy Products	517	734	1,810	2,189	3,212	2,878	5,230 *	81.7%
Eggs & Products	22	799	394	274	173	173	126	-27.2%
Fresh Fruit	5	20	595	705	861	803	812	1.1%
Fresh Vegetables	74	0	32	63	139	139	437	214.4%
Processed Fruit & Vegetables	326	716	3,119	4,764 *	3,195	2,949	4,467	51.5%
Fruit & Vegetable Juices	6	160	704	488	4,005	2,599	5,284 *	103.3%
Tree Nuts	964	5,739	6,152	3,321	7,500 *	6,712	3,488	-48.0%
Wine and Beer	338	3,813	9,922 *	3,624	3,754	3,149	6,766	114.9%
Nursery Products & Cut Flowers	180	158	516 *	310	358	343	326	-5.0%
Pet Foods, Dog/Cat	52	165	885	1,816	4,928	4,607	6,308 *	36.9%
Other Consumer-Oriented Products	1,167	1,896	4,972	4,943	10,061 *	7,000	8,900	27.1%
Wood Products Total	960	1,593	1,764	2,463	3,675	3,334	4,997	49.9%
Logs	34	0	4	40	56	56	0	-100.0%
Lumber	89	199	357	256	475	386	337	-12.7%
Plywood & Panel Products	0	20	41	68	442	417	385	-7.7%
Other Wood Products	838	1,375	1,362	2,098	2,703	2,475	4,276 *	72.8%
Fish & Seafood Products Total (Edible)	23	692 *	420	383	591	431	513	19.0%
Salmon, Whole/Eviscerated	0	0	21	0	0	0	0	NA
Salmon, Canned	0	0	0	0	0	0	0	NA
Crab & Crabmeat	0	0	0	0	0	0	0	NA
Surimi (fish paste)	N/A	N/A	0	0	0	0	0	NA
Roe & Urchin	0	96 *	84	0	0	0	7	NA
Other Edible Fish & Seafood Products	23	597 *	316	383	591	431	507	17.6%
Agricultural Product Total	27,587	45,489	92,994	84,621	112,776 *	96,228	111,396	15.8%
Agricultural, Fish & Wood Product Total	28,570	47,774	95,178	87,467	117,042 *	99,993	116,906	16.9%

Note: (*) Highest export level since at least 1970; N/A = not available; NA = not applicable.

Feature Story:

Great American Food Show--Argentina '96

The U.S. Department of Agriculture's Trade Show Office invites U.S. firms to participate in the Great American Food Show--Argentina '96. The show is scheduled August 20-22, 1996, in the Mariott Plaza Hotel, Buenos Aires, Argentina. This will be the first food trade show conducted by USDA in Argentina and will provide American food exporters an excellent opportunity to promote their products in this emerging market.

The Argentine Government recently adopted a free trade regime as a key element of its structural economic reform package. Import duties have been reduced significantly and no longer represent a barrier to trade. Accompanying these reductions is a streamlining of import regulations and procedures imposed on importers. Many Argentines travel to the United States and have a favorable impression of U.S. processed foods. Only within the past 5 years have U.S. processed foods been available on local retail shelves. U.S. exports of consumer-oriented agricultural products during 1995 were forecast to reach a record \$60 million compared to only \$4 million 5 years earlier.

The trend in food retailing in Argentina is toward larger units offering customers one-stop shopping. Roughly 80 percent of all imported foods are sold through supermarkets in Buenos Aires. Many of these are seeking to expand their processed food lines and are exploring the possibility of merchandising under private labels. Given that the domestic food processing sector is relatively undeveloped, U.S. exporters are well positioned to meet the quality, price, and variety needs of Argentina's major retailers.

This show will put you in direct contact with over 500 Argentine food industry importers, wholesalers, and retailers. A seminar series for U.S. exhibitors will be conducted on Argentina's retail food marketing system. Panel discussions with local food importers will take place along with visits to leading supermarkets and hypermarkets.

Product Eligibility

All products displayed in the Great American Food Show--Argentina '96 must be at least 50 percent agricultural and/or food ingredients of U.S. origin computed on a value or volume basis. Product labels

must indicate that the products were either produced or processed in the United States.

Show Management

The Great American Food Show--Argentina '96 is organized and managed by the Trade Show Office of the U.S. Department of Agriculture (USDA). The USDA Trade Show Office is an experienced exhibition organizer that has sponsored four to six shows annually for the past 23 years.

Registration Deadline

The application deadline for firms to participate in the Great American Food Show--Argentina '96 is May 31, 1996.

Show Facilities and Services

The Great American Food Show--Argentina '96 offers firms an attractive, full-service package, including a fully appointed booth, product shipment and customs clearance, catalog entries, and high show visibility. The show will occupy more than 500 square meters of floor space and will consist of 35 booths measuring 2.5 X 2.5 meters. The pavilion includes a business lounge, a storage area, daily product delivery, and communication services.

Product Shipment

The USDA Trade Show Office will ship, one-way, up to 300 pounds of product samples per booth from a consolidation point on the East Coast to the show site. This shipping service includes customs clearance in Argentina. Each exhibitor is responsible for delivery of product samples to the U.S. consolidation point.

Standard Booth Package

A standard booth is 6.25 square meters. Booth appointments include:

- A fascia board with firm name,
- Carpeting,
- Two spotlights,
- One electrical outlet (220V),
- One demonstration counter,
- Two chairs,
- Three shelves, and

...Food Show--Argentina '96

One wastebasket.

Optional Services and Equipment

The following optional services and equipment will be available to exhibitors at an additional charge:

Interpreters and product demonstrators, and
Extra equipment, such as chillers, freezers,
lights, and counters.

Registration and Participation Fees

Any manufacturer, processor, or seller of U.S. food products interested in participating in the Great American Food Show--Argentina '96 should contact the USDA Trade Show Office to obtain a reservation form, details of the terms and conditions related to show participation, and a floor plan of the show indicating booth layout. The fee for the standard booth package is \$2,000 with a surcharge of \$150 for a corner booth. Price information on optional services and equipment is available upon request.

Booth Selection and Assignment

Booth selection will be made on a first-come, first-served basis. Exhibitors are requested to designate in their reservation form their top three choices for booth assignment from the show's floor plan. Every attempt will be made to honor the first choice. If the first choice is unavailable, second and third choices will automatically be considered. If an exhibitor's top three choices are unavailable, the exhibitor will be contacted before a final assignment is made.

Official Show Catalog

Each exhibitor will receive a free listing in the show catalog. The listing will contain the exhibitor's contact data, the exhibitor's product line, and a brief description of the exhibitor's company. If unable to participate in the Great American Food Show--Argentina '96, firms can ensure that their company name, address, and product information will be available to Argentine buyers by advertising in the catalog. Details concerning advertising rates and how to go about placing an ad in the catalog will be provided on request by the USDA Trade Show Office.

Assistance for Small Businesses

The U.S. Small Business Administration (SBA) has programs to help small companies access and hold on to export markets. For details, contact your local SBA district office or phone (202) 205-6720.

Financial assistance is available to help companies offset the cost of promoting U.S. food and beverage exports at international trade shows.

For more details, please contact the following organization closest to you:

Eastern U.S. Food & Agriculture Export Council
Camp Hill, Pennsylvania
Tel: 717-731-6017
Fax: 717-731-6019

Mid-America Agri-Trade Council
Chicago, Illinois
Tel: 312-944-3030
Fax: 312-944-1144

Southern U.S. Trade Association
New Orleans, Louisiana
Tel: 504-568-5986
Fax: 504-568-6010

Western U.S. Agricultural Trade Association
Vancouver, Washington
Tel: 360-574-2627
Fax: 360-574-7083

Show Information

For additional assistance regarding your participation in the Great American Food Show--Argentina '96, you should contact Willis Collie, Trade Show Coordinator at the:

Trade Show Office
FAS/USDA
AG Box 1052
Room 4939, South Building
Washington, DC 20250-1052
Phone: (202) 720-3623
Fax: (202) 690-4374

Trade Policy and Market Updates

China Cuts Tariffs on Lumber and Veneer

China's Ministry of Foreign Trade and Economic Affairs has initiated publication of tariff reductions, to be implemented April 1, 1996, on approximately 70 wood products. The most important reductions were those on hardwood and softwood lumber, from 6 percent to 3 percent, and on hardwood veneers, from 9-20 percent to 5-12 percent. The tariff cuts for hardwood lumber and veneer are expected to spur further growth in U.S. exports to China. U.S. direct exports of hardwood lumber to China in 1995 increased to an estimated \$5.6 million, almost triple the record \$1.9 million in 1994. Direct exports of hardwood veneer also are rising, from \$1.2 million in 1994 to \$1.4 million in 1995. U.S. exports of hardwood lumber transshipped through Hong Kong to China are estimated at three times the value of direct shipments. U.S. exports of softwood lumber to China are minimal but should benefit from the tariff reduction.

Thailand Approves 1996 Soybean Meal Import Quota

The Government of Thailand approved a 1996 soybean meal import quota of 830,000 tons. The quota is significantly above the 1995 level, which was originally approved at 550,000 tons and later amended to 650,000 tons to meet the needs of the domestic livestock industry. The tariff for within-quota imports remains unchanged at 15 percent. Import volumes that exceed the quota will be assessed a 119-percent tariff rate. Total domestic consumption of soybean meal has risen steadily in Thailand as a result of its growing livestock sector. Thailand's soybean meal consumption rose from 913,000 tons in 1992/93 to an estimated 1.3 million tons in 1995/96. Historically, the United States has not supplied Thailand with soybean meal. Improved market access and U.S. industry efforts to promote sales by explaining the advantages of consistent U.S. meal quality and protein content have allowed U.S. exports of soybean meal to grow from 40,531 tons in 1992/93 to 71,086 tons in 1994/95.

Thailand Steps Up Broiler Production And Exports

Thailand is a major U.S. competitor for processed chicken meat in East Asian markets. Thailand is expected to increase its broiler production and exports in 1996 to 850,000 tons and 200,000 tons, respectively. This level represents an 8-percent increase in Thailand's broiler trade over last year. In 1995, domestic meat prices increased 11 percent while frozen broiler export prices to Japan rose 6 to 10 percent. Thai export sales of boneless leg meat to Japan are expected to fall due to lower prices stemming from increased Chinese competition. Export sales, however, of other processed chicken meat to Japan are expected to expand. Thai exports of all types of frozen, processed chicken meat have risen from 3,700 tons in 1991 to an estimated 25,000 tons in 1995.

EU Grants Preferential Tariff For Thai Rice

On Feb. 20, 1996, a new tariff-rate-quota (TRQ) was announced which will allow 41,600 tons of Thai broken rice to enter the European Union (EU) each year at a reduced tariff rate. The awarding of this TRQ follows a grievance filed with the World Trade Organization in which Thailand claimed that the EU's system for calculating rice tariffs violates EU Uruguay Round commitments. With this move, the EU has now awarded annual import levy concessions on a total of 338,000 tons of rice. The EU has granted preferential tariff status on fragrant rice exports from India and Pakistan and duty free status to imports from the Netherlands Antilles. EU rice imports during 1996 are forecast at 600,000 tons. While U.S. rice accounted for an average of about 50 percent of EU rice imports during the years 1990-94, less than 60,000 tons of EU levy concessions are earmarked for U.S. rice.

... Trade Policy and Market Updates

Pakistan Buys U.S. Wheat Despite Australian Competition

On January 21, 1996, the Government of Pakistan purchased 200,000 tons of U.S. soft white wheat. The United States was the sole supplier at the tender purchase despite aggressive attempts by the Australian Wheat Board to capture at least part of this sale. The recent increase of \$100 million in Pakistan's fiscal year 1996 GSM-102 allocation helped U.S. wheat maintain its competitive edge. U.S. wheat sales to Pakistan during the current 1995/96 marketing year total 1.7 million tons. Government sources within Pakistan indicate another wheat tender for 300,000 tons will be held in late February/early March.

Vietnam Receives U.S. Swine Breeding Stock

For the first time since the end of the Vietnam War, trade in breeding stock has occurred between the United States and Vietnam. Two shipments of swine breeding stock from Georgia, totaling 90 head, were shipped in January 1996. This small but momentous sale was able to reach fruition through the efforts of the U.S. Livestock Genetics Council and the Government of Vietnam. These two groups met in late 1995 to discuss a health protocol for the importation of breeding stock into Vietnam. The Georgia-based company expects to continue its relationship as Vietnam rebuilds its livestock herds. The sale received partial funding from USDA's Market Promotion Program

Russian Butter Imports Meet Domestic Needs

Major butter producers in Russia are reported to be building stocks rather than selling in the domestic market at the prevailing price for imported product. Major butter producing regions in Russia are holding firm to their offer of 17,500 to 25,000 rubles per kilo (US\$3.75 to \$5.35) while major cities are purchasing imported butter from the United States, Europe, or Oceania at a price of 13,000 to 14,000 rubles (US\$2.80 to \$3.00). Imports supplied 65 percent of the needs of the large cities at the end of 1995 and are likely to grow to 80 percent by April 1996. With imports of 230,000 tons in 1995, Russia is the world's largest butter importer. U.S. butter exports to Russia totaled 15,500 tons during the first 11 months of 1995.

Russia Emerging As Important New Citrus Market

Russia is becoming the largest new market for fresh and processed citrus due to changing tastes and preferences among its consumers. Total fresh citrus imports in calendar year 1994 reached a record 605,000 tons, valued at \$353 million. In Moscow, and other major Russian cities, citrus is widely available. European and Mediterranean countries, primarily Greece and Israel, are the major suppliers because of freight cost advantages. Florida grapefruit also is available and usually is priced only slightly above products from competing suppliers such as Israel. Excluding imports from former Soviet republics, oranges accounted for about 75 percent of Russia's total citrus imports in 1994. Russia's import duty assessed against fresh citrus was increased from 1 percent to 5 percent ad valorem on July 1, 1995. A new reference price system for imported oranges, among other agricultural products, was implemented on February 1, 1996. Under the new system, Russia's duty will be assessed on a reference price of \$1 per kilogram.

Mexico Allows Imports Of Texas Citrus

USDA and Mexican officials have finalized a phytosanitary protocol that will permit exports of Texas citrus to Mexico. Texas now joins California in being approved to export citrus to Mexico. The process of gaining export approval for the other citrus-producing states (Florida and Arizona) is ongoing. The agreement on Texas citrus represents the culmination of several years of effort on the part of USDA, Texas state officials, and industry representatives. With the Texas industry's shipping season coming to an end in April, the full benefit of the market opening will not be realized until next year's crop.

... Trade Policy and Market Updates

EU Restricts Wheat Exports and Cuts Storage Payments

The EU Commission announced it will authorize only about 2 million tons of commercial soft wheat exports during the remainder of the 1995/96 marketing season. The trade had been expecting to export an additional 4 million tons, which would have brought total commercial wheat exports up to last year's level. The Commission also plans to cut monthly storage payments to producers by 15 percent for the 1996/97 marketing year. These actions reflect the Commission's continuing efforts to dampen high internal grain prices. The lower storage payments will encourage a quicker release onto the domestic market by farmers of their grain harvests. Tight intervention grain stocks, exacerbated by early season on-farm hoarding, has limited the Commission's ability to place downward pressure on domestic grain prices.

Greece Accepts Heat Treatment Certificates For Softwood Lumber

Greek plant health officials are again accepting Heat Treatment Certificates (HTCs) for softwood lumber. Greece had stopped accepting HTCs and required Phytosanitary Certificates as of January 1, 1996. In order to permit entry of lumber already in transit and on the docks in Greece, APHIS agreed to issue Phytosanitary Certificates against the mill-issued Heat Treatment Certificates. This prevented at least four U.S. exporters from incurring expensive demurrage fees while awaiting resolution of the issue. The HTCs assist exporters by decreasing their total costs and minimize shipping delays while awaiting APHIS phytosanitary inspections. In 1995, U.S. exports of softwood lumber to Greece totaled roughly 10,000 cubic meters, valued at \$5 million. This was sufficient to build approximately 280 U.S. style homes. Most U.S. softwood lumber exported to Greece is used for millwork applications such as windows and doors.

Chile Declared Medfly Free

The Government of Chile has officially declared the country free of the Mediterranean fruit fly. The determination follows 32 years of Medfly detections and subsequent attempts to rid the country of the pest. Recognition of the Medfly-free status by importing countries, particularly those in Asia, is expected to open up significant new export opportunities for Chilean fruit, notably citrus, table grapes, and kiwifruit. One Chilean press report suggests that Chile's shipments of fresh fruits and vegetables to Asia could increase by \$500 million annually within 5 years as a result of the Medfly development.

In a related move, Japan has decided to recognize Chile's main fruit-producing areas as being free of Medfly. When finalized, this will provide Chilean citrus access to Japan's market. It also will eliminate an onerous cold treatment requirement currently applied to Chilean table grapes and kiwifruit. U.S. and Chilean grape and kiwifruit production is counter-seasonal and the two countries' exports generally do not compete directly. However, Chilean lemon exports to Japan would represent new competition for U.S. suppliers, which tend to ship year-round. U.S. exports of fresh lemons to Japan in fiscal year 1995 totaled 86,977 tons, worth \$95 million.

Chile also hopes to gain a foothold in Japan's market for its apples and pears, which have been banned due to the Medfly situation. In addition, it is anticipated that Chile will seek Medfly-free recognition from other countries in the region, including Korea, Taiwan, and China. The Medfly development is not expected to have any significant impact on U.S. imports of Chilean produce since the United States has recognized most of Chile's production areas as being free of Medfly for several years now.

... Trade Policy and Market Updates

Brazil Relaxes Import Requirements For U.S. Pears and Citrus

Brazil agreed to relax its technical import requirements on pears and citrus during meetings February 7-8 between APHIS officials and their Brazilian counterparts. For a number of other horticultural products, such as apples and grapes, both sides agreed to continue to exchange technical information. In June 1996, Brazilian and USDA officials will meet again to continue discussing possible modifications to Brazil's import requirements, which were enacted in March 1995.

Brazilian officials agreed to accept the use of an industry-proposed fungicide as an alternative to chlorine for the treatment against fire blight, Brazil's key quarantine concern. They also agreed to remove the lengthy cold treatment requirement, thus removing delays to shipping U.S. pears during the vital early months of the marketing season. For citrus, Brazil agreed to accept Florida's systems approach for controlling Caribbean fruit fly, a significant development in gaining access to the market.

Brazil has emerged as an important new market for U.S. fresh fruit over the past 2 years. During the 5-month period July-November 1995, exports of fresh deciduous fruit exceeded \$14 million, almost equaling the \$15 million shipped during the entire 1994/95 season. Pears, apples, and grapes are the leading fruit exports. Brazil has become the top export market for U.S. pears this year, with volume up 136 percent over a year ago.

Brazil's Wheat Import Shortfall Covered by U.S.

Brazil purchased 975,000 tons of new crop wheat from the United States. Brazil contracted for June forward delivery based on the expectation that exportable supplies from Argentina would be depleted by May. Additional impetus to purchase U.S. grain was generated by a decline in Canadian exportable supplies as a result of low carry-in stocks. Brazil signed a Memorandum of Cooperation, extending the acceptance of the current APHIS certification that will allow U.S. wheat to enter all Brazilian ports through September. This will provide adequate time for shipment of the new crop.

Australia Suspends Grain Handling Tests

Australia has suspended further testing of systems to move untreated, imported grain inland due to concerns that grain dust and husks escaped during a recent test-run. The test, which used Australian wheat as the cargo, was intended to check systems designed to move untreated, imported grain to the inland livestock industry with minimal risk of exposing domestic crops to seed-borne pathogens. Currently, imported feed grains must be heat-treated or cracked at port. Trial runs may be resumed in the future, although domestic producers have called for abandoning the project. The current suspension dampens hope that Australia will open its expanding domestic grain feeding market to U.S. supplies.

Guatemala To Permit Edible Tallow Imports

The Guatemalan Government has repealed a law prohibiting the use of edible tallow in shortening, margarine, or in mixtures with other edible oils. Industry sources indicate that Guatemala may import up to 4,000 tons of edible tallow annually, with the United States expected to supply the entire quantity.

U.S. Exports of Agricultural, Fish & Wood Products to All Countries

Calendar Years 1990 to 1995 and Year-to-Date Comparisons (\$1,000)

Product	Calendar Years					January-November		%
	1990	1991	1992	1993	1994	1994	1995	
Bulk Agricultural Total	20,232,083	18,348,386	19,687,248	18,593,458	18,951,466	16,586,603	23,208,612	39.9%
Wheat	3,839,037	3,292,138	4,449,324	4,664,582	4,056,007	3,630,253	4,912,322	35.3%
Coarse Grains	7,036,717	5,722,597	5,736,599	5,000,598	4,731,925	4,128,613	7,345,170	77.9%
Rice	801,527	753,557	726,072	771,312	1,010,548	907,670	903,698	-0.4%
Soybeans	3,549,508	3,956,443	4,380,402	4,598,746	4,330,427	3,711,942	4,737,843	27.6%
Cotton	2,798,495	2,491,999	2,010,338	1,540,678	2,676,263	2,284,257	3,219,893 *	41.0%
Tobacco	1,441,116	1,427,631	1,650,559 *	1,306,067	1,302,745	1,169,568	1,259,271	7.7%
Pulses	353,111	268,414	191,656	213,254	280,649	250,755	239,388	-4.5%
Peanuts	203,373	180,304	240,308	204,576	187,552	166,029	251,494	51.5%
Other Bulk Commodities	209,199	255,304	301,989	293,645	375,352	337,515	339,534	0.6%
Intermediate Agricultural Total	8,573,907	8,789,224	9,231,134	8,973,466	9,749,696	8,692,280	10,066,149 *	15.8%
Wheat Flour	182,956	184,256	184,317	205,729	211,248	193,112	216,014	11.9%
Soybean Meal	1,005,103	1,155,307	1,294,722	1,132,041	958,920	861,166	979,530	13.7%
Soybean Oil	312,930	222,126	376,202	363,897	525,077	435,091	667,342	53.4%
Other Vegetable Oils	394,790	418,144	502,732	543,897	671,187	571,895	841,735 *	47.2%
Feeds & Fodders (excl. pet foods)	1,572,369	1,605,732	1,722,327	1,744,163 *	1,738,454	1,567,949	1,740,572	11.0%
Live Animals	513,783	686,563 *	607,891	518,927	587,352	537,053	441,679	-17.8%
Hides & Skins	1,729,731	1,357,570	1,326,054	1,268,658	1,507,616	1,370,286	1,602,424	16.9%
Animal Fats	428,729	426,824	515,214	501,702	598,546	523,799	735,870	40.5%
Planting Seeds	588,723	671,655	675,011 *	619,359	648,614	548,028	579,730	5.8%
Sugars, Sweeteners & Bever. Bases	572,052	634,101	573,921	567,807	656,761	595,410	585,617	-1.6%
Other Intermediate Products	1,272,743	1,426,946	1,452,744	1,507,288	1,645,921	1,488,491	1,675,636 *	12.6%
Consumer-Oriented Agricultural Total	10,465,615	11,967,920	13,895,994	14,911,316	16,988,134	15,378,516	17,179,720 *	11.7%
Snack Foods (excluding nuts)	530,125	633,040	829,679	1,024,643	1,101,668 *	1,014,207	960,227	-5.3%
Breakfast Cereals & Pancake Mix	157,882	216,802	219,762	252,993	291,979 *	267,560	246,834	-7.7%
Red Meats, Chilled/Frozen	2,394,495	2,660,267	3,112,361	3,055,222	3,383,394	3,084,954	3,835,119 *	24.3%
Red Meats, Prepared/Preserved	135,998	165,101	181,562	220,038	253,621	226,368	257,623 *	13.8%
Poultry Meat	672,888	817,913	928,464	1,100,613	1,570,414	1,396,911	1,805,954 *	29.3%
Dairy Products	328,053	462,956	793,754	857,487 *	753,257	676,701	723,624	6.9%
Eggs & Products	101,979	143,367	139,234	139,438	164,653	151,159	154,812	2.4%
Fresh Fruit	1,486,489	1,561,053	1,683,344	1,707,147	1,953,767 *	1,812,642	1,826,659	0.8%
Fresh Vegetables	728,648	832,935	899,624	985,953	1,046,789 *	931,825	982,012	5.4%
Processed Fruit & Vegetables	1,246,751	1,394,490	1,558,121	1,639,583	1,720,891	1,562,311	1,752,374 *	12.2%
Fruit & Vegetable Juices	375,497	385,414	461,017	469,517	543,013	498,005	606,393 *	21.8%
Tree Nuts	801,120	867,704	928,531	998,246	1,106,416 *	1,009,997	1,048,228	3.8%
Wine and Beer	266,202	315,756	369,181	379,301	532,735	493,265	601,232 *	21.9%
Nursery Products & Cut Flowers	186,741	201,442	201,321	209,397 *	197,985	179,979	179,290	-0.4%
Pet Foods, Dog/Cat	244,038	329,772	399,630	497,621	577,943 *	529,721	577,735	9.1%
Other Consumer-Oriented Products	808,706	979,907	1,190,410	1,374,116	1,789,607 *	1,542,914	1,621,602	5.1%
Wood Products Total	6,481,227	6,429,179	6,741,685	7,281,313 *	7,029,961	6,435,529	6,615,531	2.8%
Logs	2,388,921	2,074,432	2,140,010	2,489,560 *	2,277,981	2,099,107	2,126,303	1.3%
Lumber	2,127,895	2,203,353	2,322,491	2,449,643 *	2,428,150	2,225,838	2,231,427	0.3%
Plywood & Panel Products	769,983	735,227	847,867	906,397	944,360 *	848,920	899,972	6.0%
Other Wood Products	1,194,428	1,416,167	1,431,317	1,435,714 *	1,379,471	1,261,663	1,357,830	7.6%
Fish & Seafood Products Total (Edible)	2,776,759	3,035,383	3,353,935 *	2,959,086	3,002,265	2,829,793	2,960,212	4.6%
Salmon, Whole/Eviscerated	666,582	436,975	681,663	583,060	518,413	508,672	536,819	5.5%
Salmon, Canned	104,276	133,644	154,401	160,416	161,577	143,073	161,828 *	13.1%
Crab & Crabmeat	363,251	431,411	448,050 *	417,660	349,136	324,604	186,448	-42.6%
Surimi (fish paste)	N/A	N/A	367,627 *	274,322	318,850	308,160	342,880	11.3%
Roe & Urchin	289,458	389,031	421,396	415,319	408,963	380,616	475,869 *	25.0%
Other Edible Fish & Seafood Products	1,353,193	1,644,322 *	1,280,798	1,108,309	1,245,325	1,164,668	1,256,368	7.9%
Agricultural Product Total	39,271,605	39,105,530	42,814,376	42,478,240	45,689,296	40,657,399	50,454,481 *	24.1%
Agricultural, Fish & Wood Product Total	48,529,591	48,570,092	52,909,996	52,718,639	55,721,522	49,922,721	60,030,224 *	20.2%

Note. (*) Highest export level since at least 1970; N/A = not available, NA = not applicable.

U.S. Exports of Agricultural, Fish & Forest Products by Major Group

Monthly and Annual Performance Indicators

Export Values	November			October-November			Fiscal Year		
	1994	1995		FY '95	FY '96		1995	1996(f)	
	-- \$Billion --		Chg	-- \$Billion --		Chg	--- \$Billion ---		Chg
Grains and Feeds 1/	1.432	1.764	23%	2.708	3.603	33%	17.637	19.1	8%
Wheat & Flour	0.432	0.562	30%	0.808	1.179	46%	5.201	5.9	13%
Rice	0.108	0.086	-21%	0.225	0.182	-19%	1.050	1.0	-5%
Coarse Grains 2/	0.556	0.749	35%	0.973	1.510	55%	7.411	7.9	7%
Corn	0.484	0.698	44%	0.838	1.395	66%	6.619	7.2	9%
Feeds & Fodders	0.201	0.222	10%	0.417	0.443	6%	2.511	2.8	12%
Oilseeds and Products	0.823	0.949	15%	1.692	1.727	2%	9.119	9.9	9%
Soybeans	0.457	0.599	31%	1.040	1.122	8%	5.274	6.1	16%
Soybean Cakes & Meals	0.099	0.102	3%	0.178	0.176	-1%	1.079	1.3	20%
Soybean Oil	0.087	0.057	-34%	0.130	0.079	-39%	0.809	0.5	-38%
Other Vegetable Oils	0.062	0.077	24%	0.127	0.150	19%	0.918	N/A	N/A
Livestock Products	0.687	0.715	4%	1.325	1.465	11%	7.808	8.8	13%
Red Meats	0.336	0.396	18%	0.656	0.786	20%	4.044	4.8	19%
Hides, Skins & Furs	0.121	0.132	10%	0.249	0.269	8%	1.719	1.9	11%
Poultry Products	0.191	0.222	17%	0.379	0.466	23%	2.210	2.4	9%
Poultry Meat	0.157	0.188	20%	0.313	0.400	28%	1.867	N/A	N/A
Dairy Products	0.064	0.059	-8%	0.125	0.117	-6%	0.812	0.9	11%
Unmanufactured Tobacco	0.142	0.152	7%	0.230	0.294	28%	1.329	1.3	-2%
Cotton and Linters	0.243	0.292	20%	0.362	0.478	32%	3.496	2.5	-28%
Planting Seeds	0.054	0.064	18%	0.115	0.116	1%	0.680	0.7	3%
Horticultural Products	0.846	0.837	-1%	1.719	1.737	1%	9.110	10.3	13%
Sugar & Tropical Products	0.170	0.168	-1%	0.360	0.355	-1%	1.940	2.1	8%
Forest Products 4/	0.617	0.564	-9%	1.203	1.139	-5%	7.274	N/A	N/A
Fish and Seafood Products 4/	0.206	0.196	-5%	0.489	0.450	-8%	3.172	N/A	N/A
Total Agriculture	4.653	5.221	12%	9.014	10.357	15%	54.141	58.0	7%
Total Ag., Fish & Forest	5.475	5.981	9%	10.706	11.945	12%	64.587	N/A	N/A

Export Volumes	---- MMT----			---- MMT----			----- MMT-----		
			Chg			Chg			Chg
Grains and Feeds 1/	10.233	9.914	-3%	18.991	20.580	8%	118.626	N/A	N/A
Wheat	2.927	2.870	-2%	5.688	6.065	7%	32.094	30.5	-5%
Wheat Flour	0.089	0.024	-74%	0.151	0.064	-57%	1.184	1.3	10%
Rice	0.425	0.240	-44%	0.854	0.519	-39%	3.767	3.2	-15%
Coarse Grains 2/	5.641	5.462	-3%	9.806	11.273	15%	65.670	56.2	-14%
Corn	4.914	5.090	4%	8.455	10.397	23%	58.645	51.0	-13%
Feeds & Fodders	0.930	1.078	16%	2.043	2.189	7%	13.483	13.3	-1%
Oilseeds and Products	3.136	3.229	3%	6.645	5.974	-10%	34.050	31.2	-8%
Soybeans	2.136	2.327	9%	4.854	4.434	-9%	23.584	21.8	-8%
Soybean Cakes & Meals	0.534	0.492	-8%	0.963	0.862	-10%	6.094	5.5	-10%
Soybean Oil	0.138	0.093	-32%	0.208	0.125	-40%	1.216	0.9	-26%
Other Vegetable Oils	0.086	0.112	30%	0.177	0.213	20%	1.281	N/A	N/A
Livestock Products 3/	0.331	0.294	-11%	0.616	0.652	6%	3.681	N/A	N/A
Red Meats	0.105	0.122	17%	0.206	0.240	16%	1.262	1.5	19%
Poultry Products 3/	0.154	0.183	19%	0.318	0.398	25%	1.943	N/A	N/A
Poultry Meat	0.149	0.179	20%	0.309	0.389	26%	1.901	2.1	10%
Dairy Products 3/	0.030	0.038	27%	0.060	0.070	17%	0.447	N/A	N/A
Unmanufactured Tobacco	0.022	0.022	1%	0.034	0.044	29%	0.197	N/A	N/A
Cotton & Linters	0.163	0.166	2%	0.244	0.268	10%	2.068	1.6	-23%
Planting Seeds	0.037	0.037	1%	0.079	0.079	-0%	0.541	N/A	N/A
Horticultural Products 3/	0.643	0.630	-2%	1.321	1.242	-6%	7.001	8.0	14%
Sugar & Tropical Products 3/	0.089	0.097	9%	0.185	0.200	8%	1.104	N/A	N/A
Total Agriculture 3/	14.838	14.612	-2%	28.492	29.506	4%	169.660	156.0	-8%

Notes: 1/ Includes pulses, corn gluten feed and meal; 2/ includes corn, oats, barley, rye and sorghum; 3/ includes only those items measured in metric tons; 4/ items not included in agricultural product totals. N/A = not available.

FY 1996 forecasts (f) are based on USDA's "Outlook for Agricultural Exports," published November 30, 1995.

U.S. Agricultural Export Value by Region

Monthly and Annual Performance Indicators

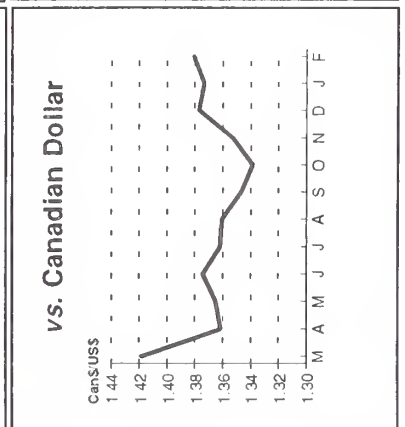
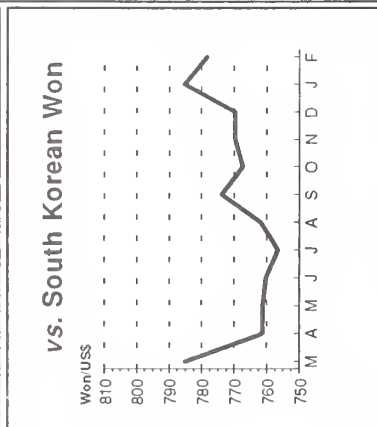
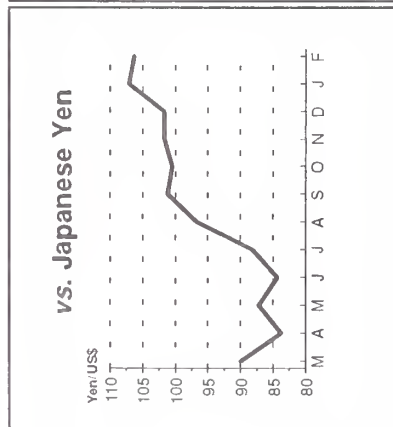
	November			October-November			Fiscal Year		
	1994	1995		FY '95	FY '96		1995	1996(f)	
	-- \$Billion --		Chg	-- \$Billion --		Chg	-- \$Billion --		Chg
Western Europe	0.775	0.854	10%	1.664	1.705	3%	8.606	9.2	7%
European Union 1/	0.731	0.825	13%	1.588	1.637	3%	8.256	8.7	5%
Other Western Europe	0.043	0.029	-34%	0.076	0.068	-10%	0.350	0.5	43%
Central & Eastern Europe	0.042	0.026	-38%	0.075	0.057	-24%	0.283	0.4	41%
Former Soviet Union	0.091	0.145	59%	0.196	0.275	40%	1.158	1.3	12%
Russian Federation	0.072	0.097	34%	0.138	0.198	43%	0.911	1.1	21%
Asia	1.858	2.375	28%	3.454	4.618	34%	23.979	26.2	9%
Japan	0.848	1.046	23%	1.659	2.021	22%	10.447	11.3	8%
China	0.070	0.142	102%	0.125	0.360	188%	2.413	2.7	12%
Other East Asia	0.636	0.731	15%	1.146	1.381	21%	7.562	8.6	14%
Taiwan	0.251	0.277	10%	0.423	0.469	11%	2.552	2.7	6%
South Korea	0.256	0.297	16%	0.473	0.591	25%	3.576	4.4	23%
Hong Kong	0.126	0.157	25%	0.247	0.321	30%	1.425	1.5	5%
Other Asia	0.304	0.457	50%	0.524	0.854	63%	3.558	3.6	1%
Pakistan	0.043	0.069	60%	0.067	0.118	78%	0.389	0.3	-23%
Philippines	0.065	0.085	31%	0.108	0.147	36%	0.675	0.7	4%
Middle East	0.253	0.205	-19%	0.411	0.447	9%	2.404	2.6	8%
Israel	0.044	0.043	-1%	0.077	0.097	25%	0.452	0.5	11%
Saudi Arabia	0.050	0.053	5%	0.087	0.096	11%	0.479	0.5	4%
Africa	0.245	0.249	1%	0.501	0.475	-5%	2.806	3.1	10%
North Africa	0.190	0.163	-14%	0.362	0.309	-15%	1.972	2.2	12%
Egypt	0.126	0.116	-8%	0.231	0.222	-4%	1.294	1.3	0%
Algeria	0.041	0.028	-31%	0.080	0.042	-47%	0.440	0.5	14%
Sub-Saharan Africa	0.056	0.086	54%	0.139	0.166	19%	0.833	0.9	8%
Latin America	0.777	0.722	-7%	1.513	1.469	-3%	8.101	8.4	4%
Mexico	0.372	0.309	-17%	0.743	0.608	-18%	3.700	3.8	3%
Other Latin America	0.405	0.413	2%	0.770	0.861	12%	4.401	4.6	5%
Brazil	0.128	0.047	-63%	0.210	0.111	-47%	0.638	0.6	-6%
Venezuela	0.036	0.015	-58%	0.060	0.062	3%	0.493	0.6	22%
Canada	0.519	0.497	-4%	0.991	1.004	1%	5.830	6.1	5%
Oceania	0.056	0.035	-38%	0.107	0.081	-24%	0.563	0.7	24%
World Total	4.653	5.221	12%	9.014	10.357	15%	54.143	58.0	7%

Note: 1/ EU-15 includes the newest member states of Austria, Finland and Sweden.

FY 1996 forecasts (f) are based on USDA's "Outlook for U.S. Agricultural Exports," published November 30, 1995.

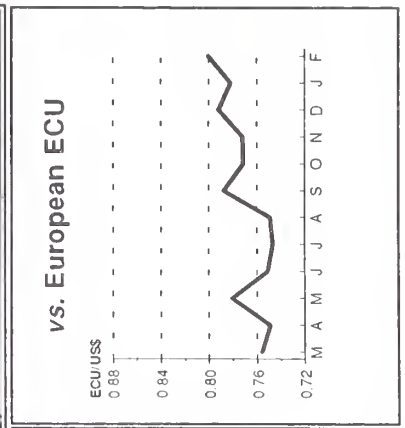
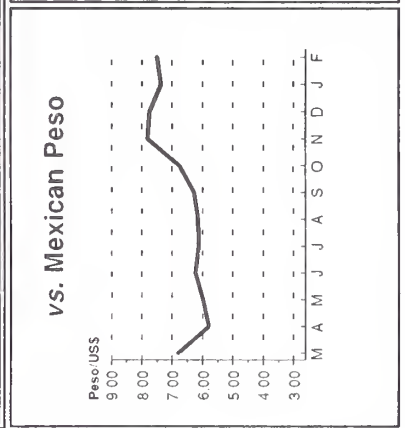
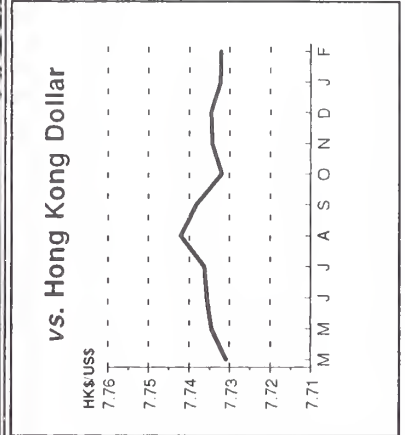
Value Of U.S. Dollar Against Major World Currencies

Daily Spot Quotations & Monthly Averages



Currencies	Current Rate 2/14/96	Month Ago 1/14/95	Year Ago 2/95	% Change Year Ago 2/95
Argentine Peso	.9996	1.00	1.00	-0.04
Australian Dollar	1.3254	1.3214	1.3356	-0.76
Brazilian Real	.9780	.84	.83	17.83
Canadian Dollar	1.3805	1.4153	1.4027	-1.58
Hong Kong Dollar	7.7321	7.7545	7.7310	0.01
Japanese Yen	106.27	98.55	98.55	7.83
Mexican Peso	7.4950	5.3600	5.8100	29.00
Taiwan Dollar	27.460	26.32	26.36	4.17
South Korean Won	778.40	794.80	790.05	-1.47
European ECU	.80032	.80965	.80160	-0.16
-British Pound	.6483	.6400	.6404	1.23
-French Franc	5.0475	5.2953	5.2280	-3.45
-German Mark	1.4646	1.5333	1.5080	-2.88

NOTE: Exchange rates are daily spot quotes as of 3:00 PM Eastern Time, February 14, 1996.
Source: TEAD/ITP/FAS Exchange Rate Database and Wall Street Journal.



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- find out about foreign import rules and regulations.
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